

Chapter 7		
Document:	Menu Selection:	Notes:
Voluntary Petition	Bankruptcy > Open BK Case	<ul style="list-style-type: none"> • Office: Refer to chart • Role Type: First party entered is "Debtor," second party entered is "Joint Debtor." • Asset notice designation: Choose y (yes) or n (no) • For receipt number enter "cc" (payment by credit card); do not change amount
Upload Creditors	Bankruptcy > Creditor Maintenance > Upload Creditors	<ul style="list-style-type: none"> • Creditor Matrix must be in .txt format
Amended Petition	Bankruptcy > Other > Amendment(No Fee Due)	<ul style="list-style-type: none"> • Note in text box why Petition was amended
Amended Schedules (Filing Fee Required)	Bankruptcy > Other > Amendment(Fee)	<ul style="list-style-type: none"> • Note in text box why Petition/Schedule was amended • Pay filing fee (credit card)
Amended Schedules (No Filing Fee Required)	Bankruptcy > Other > Amendment(No Fee Due)	<ul style="list-style-type: none"> • Note in text box which schedule(s) was amended and why

Amended or Supplemental Matrix	Bankruptcy > Other > Amended (Fee)	<ul style="list-style-type: none"> Matrix must be in .pdf format Pay filing fee (credit card) Clerk's Office will add new creditors to matrix
Change of Address	Bankruptcy > Other > Notice of Change of Address	<ul style="list-style-type: none"> Select name of party and change address in text box Clerk's Office will modify address in CM
Schedules and Statement of Affairs	Bankruptcy > Other > select appropriate documents such as Schedules A-J; Statement of Affairs; Statement of Intent	<ul style="list-style-type: none"> CTRL and Click to select multiply documents
Reaffirmation Agreement	Bankruptcy > Other > Reaffirmation Agreement	<ul style="list-style-type: none"> Select the party that you represent as the party filer Enter creditor in text box
Notice of Appearance and Request for Notice (filed by an attorney representing a party)	Bankruptcy > Other > Notice of Appearance and Request for Notice	<ul style="list-style-type: none"> Select party from list or Add/create new party Clerk's office will add attorney's name and address to mailing matrix
Creditor's Request for Notice (filed by a creditor)	Bankruptcy > Other > Creditor's Request for Notice	<ul style="list-style-type: none"> Clerk's office will add creditor's name and address to mailing matrix

Chapter 11		
Document:	Menu Selection:	Notes:
Voluntary Petition	Bankruptcy > Open BK Case	<ul style="list-style-type: none"> • Office: Refer to chart • Role type: First party entered is "Debtor," second party entered is "Joint Debtor." • Assets notice designation: Choose y (yes) • For receipt number enter "cc" (payment by credit card); do not change amount • Clerk's office will assign Judge, schedule 341 meeting, and send notice to all creditors
Operating Report	Bankruptcy > Other > Operating Report	<ul style="list-style-type: none"> • Enter filing period (e.g., "October 1, 2001 to October 30, 2001")
Application to Employ Attorney for Debtor	Bankruptcy > Motions/Applications> Employ	<ul style="list-style-type: none"> • Select Debtor as filer • Enter name of person to be employed when prompted (e.g. "Bill Jones") • Enter type of position when prompted (e.g., "Attorney for Debtor")

Affidavit Re: Application to Employ	Bankruptcy > Other > Affidavit	<ul style="list-style-type: none"> • Refer to Application (found under motion) • Enter name in first text box (<i>e.g.</i>, “Bill Jones”) • Enter title of related Application in second text box (<i>e.g.</i>, “Application to Employ”)
Application for Compensation by Attorney for Debtor	Bankruptcy > Motions/Applications> Compensation	<ul style="list-style-type: none"> • Check Attorney for Debtor as filer • Enter type as Debtor’s Attorney • Enter dates from when, to when • Enter fees requested and expenses requested (<i>e.g.</i>, “2000.00 and 125.00”) • Skip second applicant if present on screen
Disclosure Statement	Bankruptcy > Plan > Disclosure Statement	
Plan	Bankruptcy > Plan > Chapter 11 Plan	
Amended Disclosure Statement	Bankruptcy > Plan > Amended Disclosure Statement	<ul style="list-style-type: none"> • Refer to Disclosure Statement
Amended Plan	Bankruptcy > Plan > Amended Chapter 11 Plan	<ul style="list-style-type: none"> • Refer to Plan

Objection to Disclosure Statement	Bankruptcy > Plan > Objection to Disclosure Statement	• Refer to Disclosure Statement
Objection to Confirmation of Plan	Bankruptcy > Answers > Objection	• Refer to Plan
Ballot Report	Bankruptcy > Other > Chapter 11 Ballots	
Application for Final Decree	Bankruptcy > Motions/Applications> Final Decree	• Clerk's office will enter Final Decree and close case if no objections are filed
Chapter 11 Final Report	Bankruptcy > Other > Chapter 11 Final Report & Account	

Chapter 12		
Document:	Menu Selection:	Notes:
Voluntary Petition	Bankruptcy > Open BK Case	<ul style="list-style-type: none"> • Office: Refer to chart • Role Type: First party entered is "Debtor," second party entered is "Joint Debtor." • Asset notice designation: Choose y (yes) • For receipt number enter "cc" (payment by credit card); do not change amount
Operating Report	Bankruptcy > Other > Operating Report	<ul style="list-style-type: none"> • Enter filing period (e.g, "October 1, 2001 to October 30, 2001")
Chapter 12 Plan	Bankruptcy > Plan > Chapter 12 Plan	
Objection to Confirmation of Plan	Bankruptcy > Plan > Objection to Confirmation	<ul style="list-style-type: none"> • Refer to Plan

Chapter 13		
Document:	Menu Selection:	Notes:
Voluntary Petition	Bankruptcy > Open BK Case	<ul style="list-style-type: none"> • Office: Refer to chart • Role Type: First party entered is "Debtor," second party entered is "Joint Debtor." • Asset notice designation: Choose y (yes) • For receipt number enter "cc" (payment by credit card); do not change amount
Chapter 13 Plan	Bankruptcy > Plan > Chapter 13 Plan	
Chapter 13 Amended Plan	Bankruptcy > Plan > Amended Chapter 13 Plan	<ul style="list-style-type: none"> • Refer to Plan
Objection to Confirmation of Plan	Bankruptcy > Plan > Objection to Confirmation of Plan	<ul style="list-style-type: none"> • Refer to Plan

Motions/Applications		
Document:	Menu Selection:	Notes:
Motion/Application	Bankruptcy > Motions/Applications> select appropriate motion/application	<ul style="list-style-type: none"> • Select party from list or Add/create new party • Select the most appropriate motion/application from the list. Add additional text in text box if necessary. • If prompted for a receipt number, enter “cc” (payment by credit card)
Affidavit in Support	Bankruptcy > Other > Affidavit	<ul style="list-style-type: none"> • Refer to Motion • Enter name in first text box (<i>e.g.</i>, “Joe Smith”) • Enter title of related document in second text box (<i>e.g.</i>, “Motion for Relief from Stay”)
Brief/Memorandum	Bankruptcy > Other > Brief/Memorandum	<ul style="list-style-type: none"> • Refer to Motion • Enter “Support of <u>title of document</u>” or “Opposition to <u>title of document</u>” when prompted
Amended Motion/Application	Bankruptcy > Motions/Applications> Amended Motion or Amended Application	<ul style="list-style-type: none"> • Refer to original Motion/Application • Enter title of original Motion/Application in text box

Objections/Hearings		
Document:	Menu Selection:	Notes:
Objection to Motion/Application/Document	Bankruptcy > Answer (Invol. Or 304)/ General Objection/Responses /Replies > Reference an Existing Motion	<ul style="list-style-type: none"> • Select the party you represent from list or Add/create new party • Select Objection from drop down list • Refer to Motion • Enter title of motion/document that you are objecting to in text box (e.g., "Motion for Relief from Stay")
Stipulation	Bankruptcy > Motions/Applications> Stipulation	<ul style="list-style-type: none"> • Do not check "Joint filing with another attorney(s)" • Select the party that you represent • Enter with whom in text box • Refer to Motion if applicable • Enter title of related document and/or a brief summary of stipulation in text box (e.g., "Re: Motion for Relief from Stay")

Claims		
Document:	Menu Selection:	Notes:
File Claim	Bankruptcy > File Claims	<ul style="list-style-type: none"> • On <i>Search for Creditor</i> screen, enter name of creditor for whom the proof of claim is being filed; leave type as <i>all creditors</i>; click <i>next</i>. • If creditor appears on screen, select creditor and click <i>next</i>; if creditor does not appear, you must file a Notice of Appearance before filing the claim. • Enter the following: <ul style="list-style-type: none"> • Amends Claim # (if applicable) • Duplicates Claim # (if applicable) • Filed By: (select attorney or creditor) • Late • Amount Claimed • Description (if necessary) • Remarks (if necessary)

Objection to Claim	Bankruptcy > Motions/Applications> Objection to Claim	<ul style="list-style-type: none"> • Enter Claim # when prompted • Enter name of creditor in text box • Docket each objection separately
Withdrawal of Claim	Bankruptcy > Claim Actions > Withdrawal of Claim	<ul style="list-style-type: none"> • Enter Claim # when prompted • Add name of creditor in text box
Transfer Claim	Bankruptcy > Claim Actions > Transfer of Claim	<ul style="list-style-type: none"> • Select appropriate radio button (type of transfer) • Enter Transferred To: • Enter Transferred From: • Enter Claim Number: • Enter Claim Amount: • Do NOT refer to existing document
Objection to Transfer of Claim	Bankruptcy > Claim Actions > Objection to Transfer of Claim	<ul style="list-style-type: none"> • Refer to Transfer of Claim

Adversary		
Document:	Menu Selection:	Notes:
<p>Adversary Complaint</p> <p>Note: Cover Sheet should be added as an attachment to the Complaint.</p>	<p>Adversary > Open Case</p>	<ul style="list-style-type: none"> • Enter lead case (main bankruptcy case number) • Enter Plaintiff(s) first (do not include address for plaintiff) • Enter Attorney for Plaintiff • Enter Defendants(s) but do NOT add attorney for Defendant(s) (do not include address for defendant) • Enter statistical case information taken from the Adversary Cover Sheet <ul style="list-style-type: none"> • Select only one nature of suit; ALWAYS select 424 (727 objection to discharge) if it is one of the suites • Enter demand to the nearest thousand (e.g., "5" for \$5,000) • For receipt number enter "cc" (payment by credit card); do not change amount

Answer	Adversary > Answers/Objections > Complaint, 3rd Cross, Counter	<ul style="list-style-type: none"> • Select the party that you represent • Check the box to make attorney/party association • Refer to Complaint • Check the appropriate box if this filing includes a third-party complaint, cross-claim, or counterclaim
Motion	Adversary > Motions	<ul style="list-style-type: none"> • Add additional text in text box if necessary
Stipulation	Adversary > Motions > Stipulation	<ul style="list-style-type: none"> • Do not check “Joint Filing with another attorney(s)” • Select the party that you represent • Enter with whom in text box • Refer to Complaint (or Motion if applicable) • Enter title of related document and/or brief summary of stipulation in text box

Appeals		
Document:	Menu Selection:	Notes:
Notice of Appeal	Bankruptcy > Appeal > Notice of Appeal	<ul style="list-style-type: none"> • Refer to Order being appealed and related Motion • For receipt number enter “cc” (payment by credit card)
Appellant Designation	Bankruptcy > Appeal > Appellant Designation	<ul style="list-style-type: none"> • Refer to Notice of Appeal • Satisfy Appellant Designation due date • Court would suggest that copies of documents to be included in the record be filed conventionally
Appellee Designation	Bankruptcy > Appeal > Appellee Designation	<ul style="list-style-type: none"> • Refer to Notice of Appeal • Satisfy Appellee Designation due date • Court would suggest that copies of documents to be included in the record be filed conventionally
Statement of Issues on Appeal	Bankruptcy > Appeal > Statement of Issues on Appeal	<ul style="list-style-type: none"> • Refer to Notice of Appeal
Request for Transcript	Bankruptcy > Appeal > Request for Transcript	<ul style="list-style-type: none"> • Refer to Notice of Appeal

Involuntary		
Document:	Menu Selection:	Notes:
Involuntary Petition	Bankruptcy > Open of BK Case	<ul style="list-style-type: none"> • Enter Petitioning Creditor first • Add Attorney for Petitioning Creditor • Enter statistical information (change Voluntary to Involuntary) • Select the event • Enter name of alleged debtor to text
Answer	Bankruptcy > Answer (Invol. or 304) ... > Other Answers (Invol. Or 304) > Involuntary Answer	<ul style="list-style-type: none"> • Refer to Summons • Refer to Involuntary Petition

Utilities/Reports		
Document:	Menu Selection:	Notes:
Change Password	Utilities > Maintain Your ECF Account	<ul style="list-style-type: none"> • Scroll down to bottom of screen and click on <i>More user information</i>. After changing your password, click on <i>Return to Account Screen</i> then scroll down to bottom of screen and click <i>Submit</i> to have any changes recorded.
View Your Transaction Log	Utilities > View Your Transaction Log	<ul style="list-style-type: none"> • Enter start date and end date
Creditor Mailing Matrix	Reports > Creditor Mailing Matrix or Utilities > Mailings	<ul style="list-style-type: none"> • The 1-column file can be saved as a text file on your computer with the "File/Save As" browser option. The saved file can then be edited and printed on labels or you can use the cut and paste option.
Docket Report	Reports > Docket Report	<ul style="list-style-type: none"> • Enter case number • Select criteria for generating the report • Click <i>Run Report</i>
Claims Register	Reports > Claims Register	<ul style="list-style-type: none"> • Enter case number • Click <i>Run Report</i>

Cases Report	Reports > Cases	<ul style="list-style-type: none"> • Select criteria for generating the report (select multiple categories by holding down the <i>Ctrl</i> key and clicking on the categories in the list) • Click <i>Run Report</i>
341 Meeting Calendar	Reports > Deadlines/Hearings/ 341 Calendars > Select 341 Meeting from <i>Deadline/Hearing</i> list	<ul style="list-style-type: none"> • Select criteria for generating the report (select multiple categories by holding down the <i>Ctrl</i> key and clicking on the categories in the list) • Click <i>Run Report</i>
Judge's Calendar	Reports > Calendar Events > Select All hearings from <i>Calendar Event</i> list	<ul style="list-style-type: none"> • Select criteria for generating the report (select multiple categories by holding down the <i>Ctrl</i> key and clicking on the categories in the list) • Click <i>Run Report</i>

Help	
Screen:	Instructions for Attorneys and Trustees:
Joint filing with another attorney(s)	You will see this check box if you are an attorney. Check it if this is a joint filing. You will be able to select the attorney(s) on another screen. Do not check if you are filing a Stipulation or Reaffirmation Agreement.
Select the Party	Select the party that you represent from the list; Trustees will select themselves as trustee. If the party is not listed, select the <i>Add/Create New Party</i> button. For certain types of filings, you may also have the option of selecting a group of parties rather than individuals.

Add Party	<ol style="list-style-type: none"> 1. Search for the party. <ol style="list-style-type: none"> a. Begin by searching to see whether the party is already in the database. b. To search, enter the party's Social Security number or Tax ID, or all or part of the last or business name, and click the <i>Search</i> button. 2. Select a party already in the database or add a new one. <ol style="list-style-type: none"> a. If the party is already in the database, highlight the name on the party list, and click the <i>Select name from list</i> button. b. To add a new party to the database, click the <i>Create new party</i> button. In either instance, the <i>Party Information</i> screen will be displayed. 3. Enter the information about the party. <ol style="list-style-type: none"> a. For a party already in the database, fill in the party role and pro se fields, and enter party text if needed. (Party text appears after the party's name on the cover sheet of the docket, e.g., ABC Corporation, a subsidiary of XYZ International.) b. To change address information just for this case for a party already in the database, type over the existing address information. c. For a new party, fill in the name, address, party role, and pro se fields, and enter party text if needed. 4. Click <i>Submit</i> only after all attorneys and aliases have been added. <ol style="list-style-type: none"> a. If the case being opened is a joint petition, the search screen will be displayed for the joint debtor, with a check box to copy the first debtor's address information. b. If the case being opened is an adversary
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<p>The following attorney/party associations do not exist...</p>	<p>If you see these words: "The following attorney/party associations do not exist for this case. Please check which associations should be created for this case," you have selected an attorney and a party who were not previously associated. You may have checked the wrong person on the party list. If so, use the <i>Back</i> button to change the selection. If your selection was correct, check the box for each new party/attorney combination that should be established. Trustees will not check this box unless they have been employed as attorney for Trustee.</p>
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<p>Select the PDF document</p>	<p>Type in the file name of the PDF document containing the pleading you are filing; or click on the <i>Browse</i> button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf).</p> <ul style="list-style-type: none"> • If your filing does not have attachments, click <i>next</i> to continue. • If your filing has attachment(s) (e.g., financing papers, exhibits, etc.), click <i>Yes</i> for "Attachments to Document." Click <i>Next</i> to see the attachments screen. <ol style="list-style-type: none"> 1. Enter the PDF document that contains the attachment. Type in the file name of the PDF document containing the attachment you are filing; or click on the <i>Browse</i> button to search your network and select from those files. Remember to change the file type to Acrobat (*.pdf). If your filing has more attachments, first continue labeling this attachment following the instructions below. 2. At your option, select a document type and/or enter a description. If you press the down arrow to the right of the <i>Type</i> box, you see a list of available attachment types. Select the one you want by highlighting it. Description: Type a short description of your attachment. 3. Add the filename to the list box below. Add the attachment you have entered to this list by clicking the <i>Add to List</i> button. If you have made a mistake, highlight the mistaken attachment and click the <i>Remove from List</i> button. If you have more attachments, go back to Step 1. Continue until all your
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Does this refer to an existing document?	Check the box if you would like to relate this event to an earlier event in this case.
Notice of Electronic Filing	<p>The Notice of Electronic Filing is the verification that the filing has been sent electronically to the Court's database. It certifies that this is now an official court document.</p> <ul style="list-style-type: none"> • Clicking on the case number hyperlink will present the docket report for this case. Note that you will be prompted for your PACER login and password. • Clicking on the document number hyperlink will present the PDF image of the document just filed. Clicking on the document number here will allow you to view the filed document once without charge. Subsequent access to any Query or Report programs must go through the PACER system. Users must be registered with the PACER system to have a login and password. • Scroll down to see participants who have or have not registered for electronic noticing on this case. • To print a copy of this notice, click the browser <i>Print</i> icon. • To save a copy of this notice, click <i>File</i> on the browser menu bar and select <i>Save Frame As</i>.